

# SchoolNet 3.0 New Year Procedures

# FOOD SERVICE

# Starting the year with New Year Temporary Applications

### Re-Cap of the Eligibility New Year Process:

- Existing Applications are archived.
- Duplicate Applications are created (minus exited and graduated students), designated 'New Year Temporary' Applications to allow active, enrolled students to begin school with the benefits that were in effect at the end of the preceding year.
- New Year Temporary Applications are assigned default expiration dates (9/30). This date may be changed while performing the New Year Eligibility procedure.
- When a new Household Application is received, the Re-Apply procedure is performed against the household's Temporary Application. Income Guidelines for the current year are referenced.

## Synopsis / Processing Steps:

Or, what happens after the Food Service New Year Processes have been completed:

Step 1 Move a Kindergarten Student from a Household Member to a Household Student on a Temporary New Year Application

To utilize this feature:

Incoming Kindergarten students must be present as Household Members on Temporary New Year Applications.

The Household Member Category must be 'Child-non school age'.

The incoming Kindergarten student must be enrolled and present in the Student Editor. These new students <u>may</u> be eligible for household benefits extended from the previous year. If these students are eligible for temporary New Year benefits, they must be removed from the Household Members portion of the application and inserted as Household Students.

No other modifications to a New Year Temporary Application are permitted.

### Step 2: Perform the Re-Apply Procedure against a New Year Temporary Application:

Household applications for the New Year are processed by locating the New Year Temporary application for that household, and then performing the Re-apply procedure. Since the Temporary Application already contains the majority, if not all of the household information, Re-Apply consists only of completing any changes present on the new application, and calculating. The results of calculation (Increase, Decrease, No Change) determine the effective date of the new application, as controlled by the Application module Preferences, 'Benefit Increase Days' and 'Benefit Decrease Days'.

### Step 3: Print Eligibility Letters:

Go to the Eligibility module, open Reports, and select Letters & Labels. Eligibility Letters are printed by type (Approved, Temporary Approved, Denied). After successful printing, you may choose to mark these applications to exclude them from future printing runs. You may also, at any time, reprint a letter for any active application.

# Step 1: Move a Household Member - Child, non-school age - to Household Student

The incoming Kindergarten student must be:

- Present on the New Year Temporary Application as a Household Member, Category Child-non school age.
- Present in the SchoolNet Student file. When a child is moved to the Household Student classification, the Add Student [Application] process searches the SchoolNet Student file using the child's name as search criteria.
- 1 Locate the New Year Temporary Application

Open the Eligibility Applications module.

Click on Find.

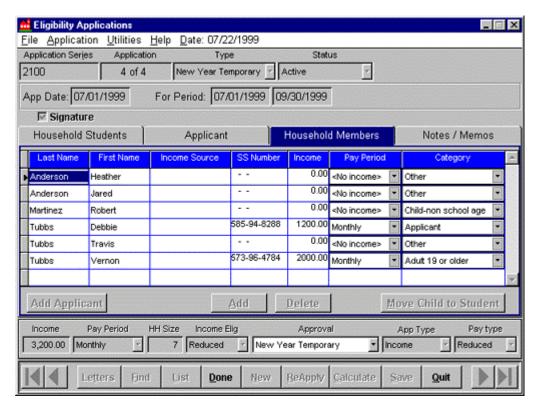
Search by student, applicant or application ID number to locate the application series.

The 'Application Series' displays the most current application in the series, which is the New Year Temporary Application.

2 Edit the New Year Temporary Application

Click the **Edit** button.

Move to the 'Household Members' tab.

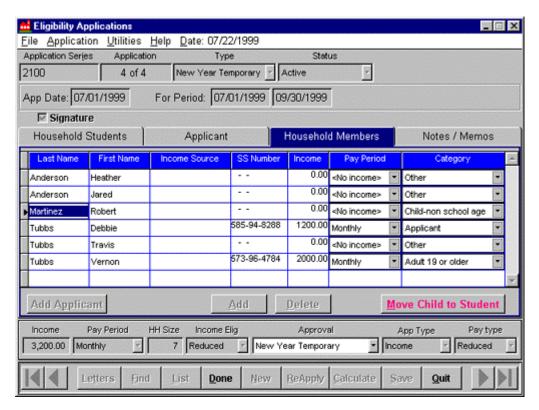


New Year Temporary Application, edit mode, Household Members tab

3 Select the 'Household Members Child'

Click on the row that contains the Child. The selected row is marked at the left end of the row.

The Move Child to Student button is enabled when a Household Member Child is selected.



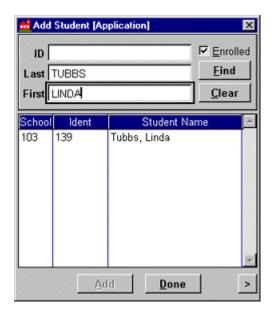
Select Child, enable Move Child to Student button

4 Move Child to 'Household Students'

Click the **Move Child to Student button** to run the Add Student feature using the Child's name as search criteria. If a name is located in the student file that matches the Child's name, it is displayed in the **Add Student** [Application] window.

Click on the student name to select.

Click the **Add** button to insert the student as a Household Student on the New Year Temporary Application.



Add Student [Application], student found

If a corresponding name cannot be located in the Student file:



Uncheck the **Enrolled** checkbox and click the **Find** button.

If the expanded search is still unsuccessful:

Check the spelling. The Child's name may be spelled incorrectly on the application or in the Student file.

Correct the spelling, then re-try **Move Child to Student**.

The Child is not present in the SchoolNet Student file.

# Step 2: Perform the Re-Apply Procedure against a New Year Temporary Application:

The Re-Apply procedure essentially duplicates the New Year Temporary Application. Changes in household status (per information received for this year) are made to this application. When calculated, this new application references the New Year Temporary application to determine Increase/Decrease/No Change in Benefits. The Application Effective Date is adjusted accordingly, as per the Application module Preferences 'Benefits Increase Days' and 'Benefits Decrease Days' (see Applications File menu, Preferences).

#### Recommendations:

Preference Settings:

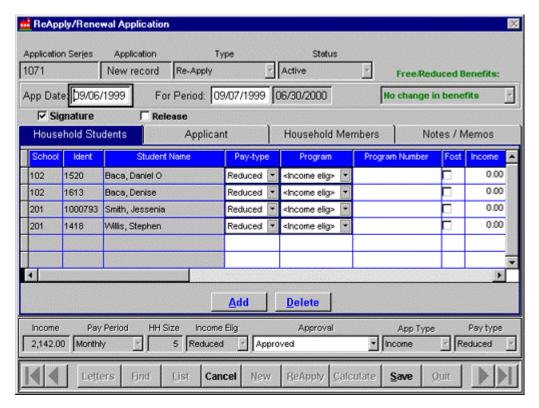
Benefits Increase Days = 1

Benefits Decrease Days = 10

When processing applications before the first day of school:

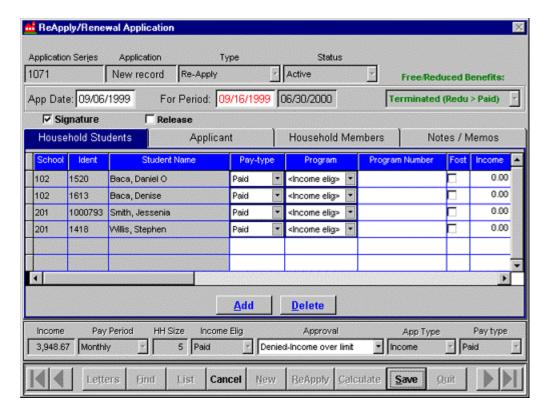
Set the System Date (Date, menu bar) to the first day of school. The App Date (Application Processing Date) will then default to the first day of school. The ten-day extension required for 'Decrease in Benefits' Applications will then occur within the school year.

- 1 Locate the New Year Temporary Application.
- 2 Click the **ReApply** button.
- 3 Select 'Yes' from the Reapply prompt.
- 4 Compare the new application submitted by the household and the Re-Apply application.



### ReApply application

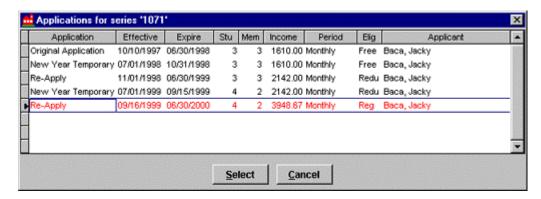
- 5 Make the appropriate changes in income, household size, etc. to the Re-apply application.
- 6 Click the Calculate button.



ReApply application, new household information entered and calculated

- 7 Evaluate calculation results and effective date.
- 8 Click the Save button.

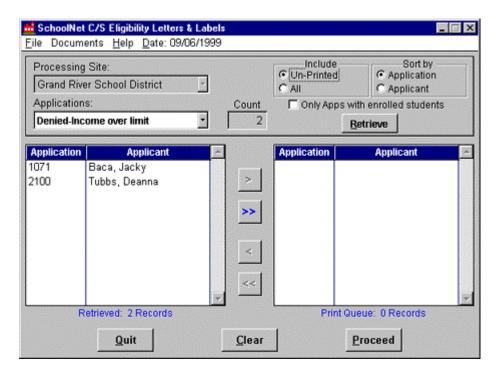
A new application has been added to this series using current household data. Click the **List** button to view this series.



Application series, List

### Step 3: Print Eligibility Letters:

- 1 Open the Food Service Eligibility module.
- 2 Open Eligibility Reports
- 3 Open Eligibility Letters & Labels
- 4 Select the type of application (Approved, Denied etc.)



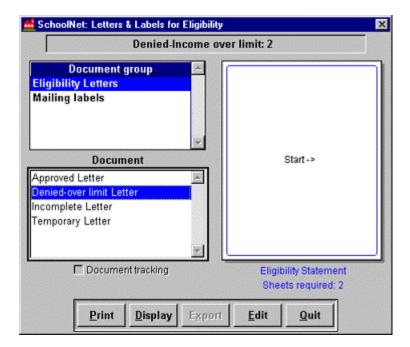
### Print Application Letters

- 5 Retrieve the applications (shown by applicant)
- 6 Move all or selected application to the **Print Queue**.

Use the >> button to move all retrieved applications, or

Click on the desired applicant name(s) to select, then use the > button to move only the selected applications to the **Print Queue**.

7 Click the **Proceed** button.



Print Eligibility Letters, select Letter

- 8 Select Letter to be printed.
- 9 Click the **Display** button to view and confirm before printing.
- 10 Click the **Print** button.
- 11 Click the Quit button



Tag Letters as Printed

12 Select 'Yes' or 'No' to mark these letters as having been successfully printed.